Key IRS.gov Information Pages:

- Important Update about Your e-Services Account
- Secure Access: How to Register for Certain Online Self-Help Tools

Question Categories:

- Early Option for Registration
- Personal versus Business Registration
- IRS Assistance as of October 24
- Phone Issues
- Password Issues
- Filing/TDS Issues as of October 24 and Later
- Effect on Related Tax Professional Products and Tools
- Secure Access General

EARLY OPTION FOR REGISTRATION

Should users register through Get Transcript Online before October 24?

Get Transcript uses the same identity authentication process. If you successfully register through Get Transcript Online, all you have to do on October 24 is change your e-services password. However, help for users needing assistance with registration will be available starting October 24 when e-services moves behind the additional authentication.

PERSONAL VERSUS BUSINESS REGISTRATION

Why must people use their personal credit card or mobile phone?

Secure Access authenticates the individual, not the organization or state. It requires the users' personal information in order to complete the financial verification and the mobile phone verification. The IRS does not retain the financial information submitted by the user.

What if I don't want to use my personal mobile phone for the Secure Access authentication process or what if my organization does not allow mobile phone use at work?

If you do not want to use a mobile phone associated with your name as your verification, you may request an Activation Code by Mail, which will be delivered within five to 10 calendar days. Once you receive the activation code, you can return to your e-services account and enter the business mobile phone number. You will immediately receive a security code text; enter that information as well, and complete the process. Each time you access e-Services, a security code will be sent to the mobile phone you used to register. If your company does not allow mobile phones in your work area, this is a policy decision that should be discussed with your firm or state. The IRS is working to expand the two-factor authentication so that a voice text may be sent to a landline. However, this new landline feature may be several months away.

If I have one username for Get Transcript, and another username for e-Services, which will become my overall User ID going forward?

Your e-services username will become your default username for all IRS.gov tools using Secure Access, such as Get Transcript Online.

I've been unable to complete Get Transcript Online registration since Secure Access was put in place. Is that because I already have an e-services username and password?

No, your current e-services username is not preventing you from authenticating for Get Transcript. See Secure Access: How to Register for Certain Online Self-Help Tools.

Will each username have just one email address associated with it?

Yes

If so, and if I use my work address, then will items related to my personal activities (e.g., my personal use of Get Transcript) be sent to my work address?

No, personal Get Transcript requests are sent to the IRS Address of record if there is a mail request.

Or, if I use my personal address, then will items related to my work activities (e.g., my work-related use of Transcript Delivery Service) be sent to my personal address?

No, transcripts requested through TDS are sent to the user's Secure Object Repository (SOR) accessed through e-services.

IRS ASSISTANCE AS OF OCTOBER 24

What is the success rate for Get Transcript? What is estimated success rate for e-services?

We have put in place some extraordinary steps to help ensure that e-services users are authenticated by web, by phone or in person. For those who cannot authenticate online, we will have additional personnel added to the e-Help Desk starting October 24. We have created a process that allows assistors to try to authenticate the e-services users who need assistance and issue an activation code by mail. If the assistor cannot authenticate the users' identity by phone, the user may need to go to a Taxpayer Assistance Center to present identification in person.

If I go through a different device (different computer), do I have re-authenticate?

No.

If I authenticate over the phone with e-Help, will I get my verification code over the phone?

No, the activation code will be mailed. Delivery can take five to 10 days.

PHONE ISSUES

What if an agency has a policy against receiving texts on agency cell phones or having text capability for security reasons?

One reason for providing advance notice is so agencies and organizations could identify potential policy issues and make adjustments if necessary.

Do I need a mobile phone to complete registration for e-services? (New 10/04/16)

Yes, at this time, you must have a text-enabled mobile phone to complete the authentication and registration process. Secure Access is a two-step authentication process, meaning each time you return to e-services you must enter your credentials (username/password) plus a new six-digit security code sent each time to your registered mobile phone.

What type of mobile phone do I need? (New 10/04/16)

To complete your identity authentication in one session, you will need a U.S.-based, text-enabled mobile phone associated with your name, i.e. your name or address is associated with account. If you do not have a personal mobile phone that meets the requirements or do not want to use your personal mobile phone, you may request an activation code by mail, which will be delivered within five to 10 calendar days.

Can I use my business mobile phone or Google Voice? (New 10/04/16)

Yes, but you must opt for the activation code by mail during authentication. Once you receive the activation code, you will return to the Secure Access registration page, enter the activation code and register your optional mobile phone. It may be a business mobile phone, Google Voice or pay-as-you-go mobile phone. At this time, it cannot be a landline or Skype. Google Voice is the only virtual phone supported. After entering the mobile phone number, you will receive a security code that you must enter to complete the phone registration process.

Can my colleagues and I use the same mobile phone number? (New 10/04/16)

No, each individual user who registers must have a unique phone number.

What do people do who do not have a phone with text capability? For example, I only have landline phones at home and work. (Revised 10/04/16)

At least for now, you must have a U.S.-based, text-enabled mobile phone in order to successfully register for e-services. You will need a mobile phone to receive an activation code which helps verify your phone and you will need a mobile phone to receive a security code each time you attempt to access e-services. The IRS is working to expand the two-factor authentication so that a voice text may be sent to a landline. However, this new landline feature may be several months away.

PASSWORD ISSUES

What are the field requirements for passwords for e-services access?

Password rules:

- Must be between 8 and 20 characters
- Is case sensitive
- Must contain at least one numeric and one special character (!@#\$%"&")
- Must have at least one uppercase and at least one lowercase letter
- Matching password must be re-entered

How often do I need to reset my password?

Once you are successfully authenticated, there is no time limit on your password. It will not expire.

Will I have to authenticate again?

Users will recertify every two years. Users will need to go through the authentication process only: Basic ID Proofing, Financial Verification, and Cell Phone Validation. They will not need to make any changes to their user profile (password, site image/phrase.)

FILING/TDS ISSUES AS OF OCTOBER 24 AND LATER

For reporting agents, there is an October 31 deadline approaching; for transmitters and developers there's a testing period approaching, what are you doing for them if they can't pass Secure Access?

One reason we want to give you plenty of time in advance of this change is so you can plan ahead. If you need to update a certificate, do it now. If you're an ERO who needs to make some changes to your e-file application, do it now. If you're a reporting agent using e-services to electronically file 94x returns, try to file those returns before October 24. Most reporting agents file using the Application to Application (A2A) transmission method. For those using this method, as long as your certificates are updated and current your electronic filing activities will not be interrupted. Again, given the range of e-services users and the need to protect e-services, this is the best time to make this change.

Will lack of access to e-Services get in the way of e-filing for anyone who e-files other than through A2A, such as over the Internet?

The Internet Filing Application (IFA) transmission method requires access to your e-Services account. Therefore, you must register through Secure Access Authentication to electronically file using IFA. More info on IFA is in the MeF_Submission_Composition_Guide. See page 4 (pdf page 9)

What about filing of ACA information returns?

User Interface (UI) Transmitters of ACA information returns require access to their e-Services account to electronically file. Therefore, you must register through Secure Access Authentication to electronically

file using the UI. More info about the UI channel can be found at <u>Affordable Care Act Information</u> Returns (AIR) Program.

Do you think that all agencies are going to be okay with not being able to access TDS transcripts for a week or two? We access them daily.

For many users, it will take about 10 to 15 minutes to complete the re-registration process in one session. Some users will require authentication assistance from the e-Help Desk, in which case an Activation Code by Mail will be issued and delivered within five to 10 days. One reason for early notification was so organizations could identify potential issues and make adjustments.

Get Transcript uses the same identity authentication process. If you successfully register through Get Transcript Online, all you have to do on October 24 is change your e-services password. However, help for users needing assistance with registration will be available starting October 24 when e-services moves behind the additional authentication.

Will this affect filers who submit information returns such as W-2s, 1099 and 1098s?

Filers of W-2s, 1099 and 1098s are not affected by this registration change. Those forms will continue to be filed through the Filing Information Returns Electronically (FIRE) which does not require you to log into e-services.

EFFECT ON RELATED TAX PROFESIONAL PRODUCTS AND TOOLS

Will re-authenticating make any changes in terms of my connection to the entities for which I have the authority to perform certain tasks, or change any of my authorized roles?

No.

Is there any impact on IRS PPS telephone line?

No, users experiencing difficulty with registration should use the e-Help Desk.

Will there be any communication that encourages Responsible Officials listed on the e-file Application to re-register through Secure Access by some future date given that IRS wants all users who transact electronically with IRS to authenticate themselves?

IRS expects all individuals associated with an e-file application – principles, responsible officials and delegated users - to register through Secure Access.

Does this impact EFTPS?

No.

I had a printing problem with Chrome and TDS and had to switch to IE? Is this an issue?

E-Services is only compatible with IE6 to IE11. This is an e-services issue; not a Secure Access issue.

Secure Access General

Do we need to enter a security code every time we return to e-services and if so, why?

Yes, after you successfully complete authentication, a security code will be sent to you each time you attempt to enter e-services. The security code is the key feature that makes Secure Access a two-factor or two-step authentication process: your credentials (username/password) AND your security code. This process helps prevent account takeovers by cybercriminals. E-services users are targets of cybercriminals (See <u>SCAM ALERT</u>) seeking to steal credentials and other data. Even if you fall victim to a phishing scam and your credentials are stolen, the account is still protected by the security code.

What will the experience be if you log in using your old user ID and password after October 24?

You will be prompted through the new Secure Access Authentication process. Once you complete the new authentication process, your e-Services user name will remain the same and you will be prompted to change your password.

What if someone's name has changed recently because of marriage/divorce and their current account does not reflect the name change? Will it be difficult or impossible to re-register on October 24? Should we update their account in the next four weeks only to re-register again next month?

Your e-services account should always be up-to-date. When you re-register for e-services starting October 24, the basic identity proofing segment is matching the information you enter as part of authentication with the information on your most recently filed tax return – example name, address, date of birth, social security number and filing status. If the information you enter does not match the information on the tax return, you may not move to the next step.